# Manage Proxy Functionality

There are a number of business scenarios in which CHRIS users need to grant delegates the ability to act on their behalf (act as proxy users for them) when performing specific assigned roles and responsibilities. The "Manage Proxies" functionality allows a user to effectively delegate their login to another user.
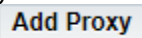
The delegator can grant access to specific responsibilities or workflow notification types to the proxy user, rather than having to grant access to all functionality. This provides the flexibility needed to meet typical business needs.
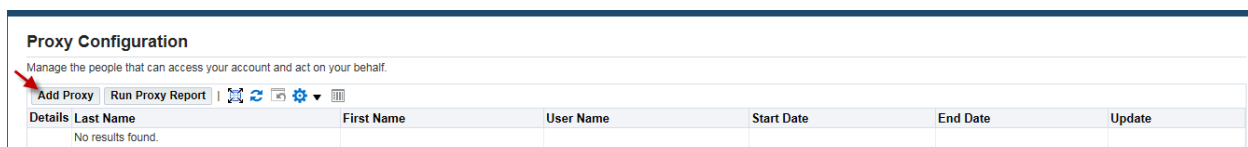

Click on the settings icon to manage proxies and view access requests. Click 'Manage Proxies' from the drop down box.
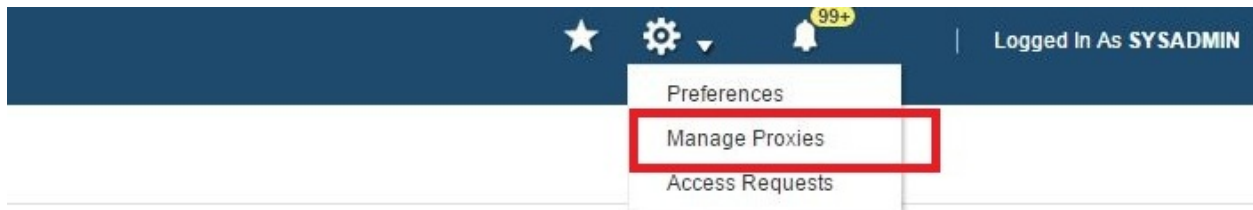
Manage Proxies - Allows you to manage the people that can access your account and act on your behalf. The Manage Proxies link takes you to this page. Click on the 'Add Proxy' **Add Proxy** button to assign/manage proxies

The Add Proxy link takes you to this page

Add People Section

You can enter a User to whom you want to be your Proxy.

Enter the proxies user name. You can enter the first name and select from the list of values
Enter the required 'Active From' Date
Enter the 'Active To' date, if known
Enter Notes to Proxy, as needed

Options of granting access for responsibilities and/or worklists:

> **None:** Access for any notification cannot be granted
> **Selected**: Access for some notifications can be granted
> **All**: Access for all notification types can be granted **(Do not use)**

WARNING: If '**All**' is selected for Grant Responsibility Access, the proxy will have access to your Personal Self-Service view that contains all of your personal information.
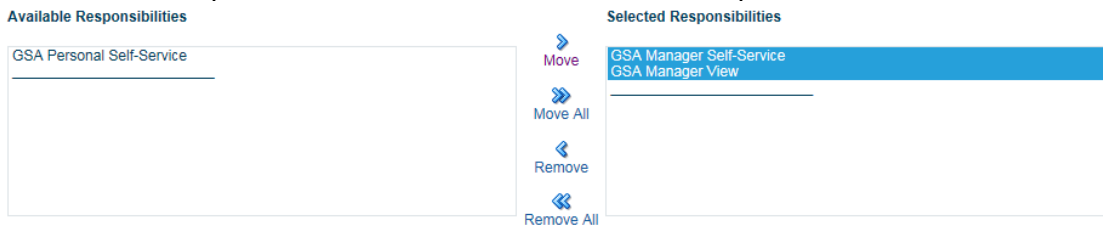

Click on the "Selected" radial button for the Grant Responsibility Access. This will allow the user to select the specific responsibility that will be granted.   Click on the 'Move' arrow
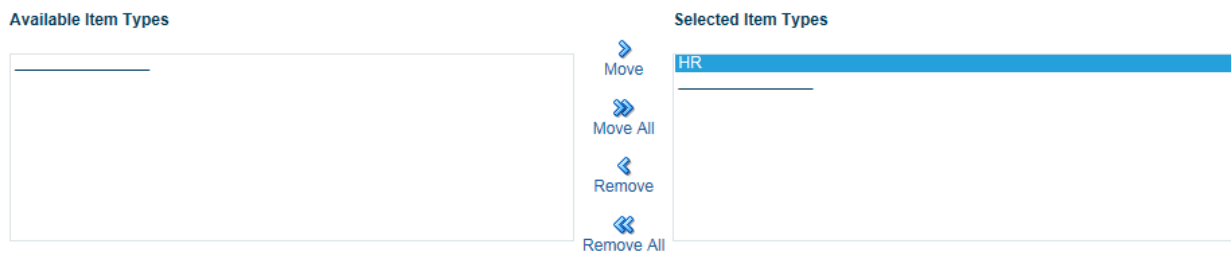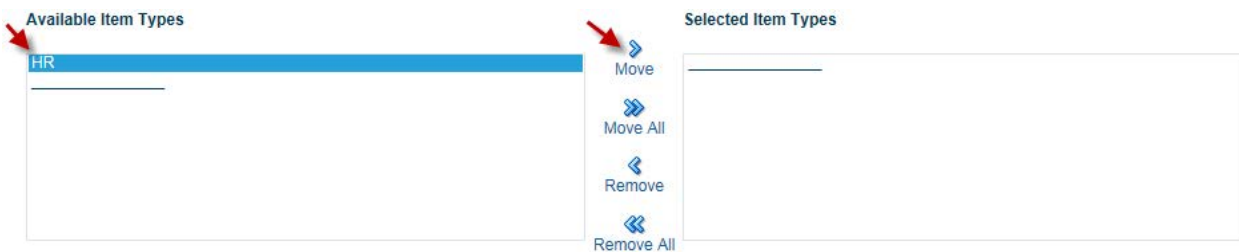
Available Responsibilities

GSA Manager Self-Service
GSA Manager View
GSA Personal Self-Service

Selected Responsibilities

›
Move

»
Move All

‹
Remove

«
Remove All

The available responsibilities are now in the Selected Responsibilities column.

Available Responsibilities

GSA Personal Self-Service

Selected Responsibilities

GSA Manager Self-Service
GSA Manager View

›
Move

»
Move All

‹
Remove

«
Remove All

Grant Worklist Access

Workflow Item Types   ◯ None

◉ Selected

◯ All

Using the 'Selected' option, select the worklist that will be granted and click on the 'Move' › arrow

Available Item Types

HR

Selected Item Types

›
Move

»
Move All

‹
Remove

«
Remove All

Available Item Types

Selected Item Types

HR

›
Move

»
Move All

‹
Remove

«
Remove All

Click the Submit [Submit] **button**

The delegate will receive a proxy confirmation

Logged in as the Proxy

The Proxy notification will display in your worklist once the grantor has submitted the proxy request. Click on the proxy notification to view the details, including any notes from the delegator.

Click 'OK' button to close the window

As the user that has been delegated responsibilities and/or worklists, you can still access your current responsibilities and worklist from your homepage. From this screen, the user will have a new option.

Switch User [icon] icon is used for going to the list of users for which proxy has been granted to the logged in User

Click the Switch User icon. The Switch User screen displays
Click the 'Switch' icon

The screenshot below shows that while logged in as ROSEGSATEST, she is now the proxy for her supervisor of record. She has access to his Manager Self-Service and Manager View as well as any notifications that are pending in his worklist.

Note: When performing transactions as a Proxy, the system's 'created by' and 'last updated by' information will reflect as if the grantor completed the transactions.

To return to your own login/responsibilities, click the 'Switch User' icon.

Back to Rose GSATest's home page